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## Overview

Case Note Tracking is the system used by Administrators on our BCHC Inpatient Wards. It is a form which allows monitoring of Sending/Receiving Documents for a Client.

## Accessing Case Note Tracking

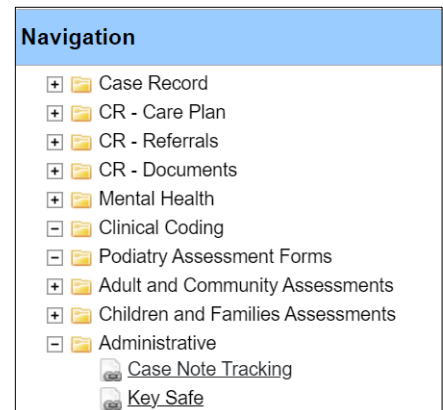
### Access via Menu

- Click **Quick Menu**
- Click **Client's View**
- **Search** for Client

### Clinical Portal – Client's View displays

#### Navigation Pane (located on right)

- Click **Administrative**
- Click **Case Note Tracking**



The Case Note Tracking form displays

**Date/Time:** Complete as required

Navigate to the section you wish to complete – are you **sending a document** or **receiving a document**?

Sending document							
File Type	Volume	Sending Service/Ward	Sent to Location	Date/Time Sent	Method of Despatch	Reason for Sending	Action
Please Select ▾					Please Select ▾	Please Select ▾	Add

Receiving document							
File Type	Volume	Receiving Service/Ward	Sent to Location	Date/Time Received		Reason for Receiving	Action
Please Select ▾						Please Select ▾	Add



**File Type:** BCHC Notes

**Volume:** (e.g., V1)

**Sending Service/Ward:** (e.g., MHH Ward 6)

**Sent to:** (e.g., WHH Ward 14)

**Date/Time Sent:** Today/Now

**Method of Dispatch:** (e.g., With Patient)

**Reason for Sending:** (e.g., Inpatient Episode)

- Click **Add**

The action you have recorded will now turn green

- Click **Save**

## Case Note Tracking Options

Once the Case Note Tracking has been completed there are several options at the bottom of the screen:



### Edit Current

This will allow you to open the current form to make any changes if necessary.

### Create New

Allows you to create another Tracking form for the Client.

### Index

Displays all Case Note Tracking forms in a chronological order.

### History

This will show the amendments made to a form – displaying the latter at the top followed by the previous incorrect version.

### Lock

This functionality is not used for Case Note Tracking.

### Entered In Error

If this is used it will display as shown below:

Case Note Tracking			
Auto-Saved	Date/time	Created by	Locked/Concealed
	3-July-2023 08:00	Janice Pettitt	